DELTA DENTAL®

Delta Dental of Minnesota
Employer Services Portal

Quick Guides

Table of Contents

Billing

Users

Eligibility

System Requirements

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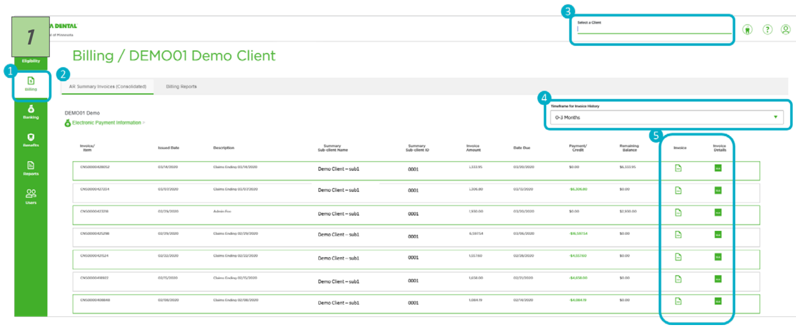
Employer Services Portal Quick Guide

How to view self-funded billing reports

View your most recent AR Summary (aka consolidated) invoices (claims and admin) and supporting billing reports (claims details and subscriber listings)

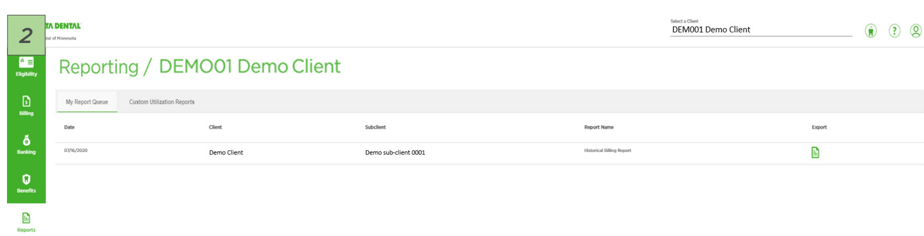
1. Select billing from the left navigation menu on the ESP home page.
2. The AR Summary screen displays:
   a. Assigned client.
   b. Most recent billing transactions at the top of the page. ***(Image 1)***



3. If you have access to more than one client/group, select a client at the top line of the application to reveal AR data for an alternative client.
4. Select alternative time periods to view historical billing events.
5. Each billing event provides a corresponding invoice (PDF icon) and invoice details (XLS icon).
   a. Select either report icon at the line item level to view the supporting invoice and reports.
   b. Documents will download to your browser upon selection.

   NOTE: Some reports will take longer to generate. If so, you will be prompted to access the report in the report queue.

6. Click on billing on the left navigation bar to return to the billing screens to access additional reports and information. ***(Image 2)***



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Employer Services Portal Quick Guide

How to view self-funded billing reports

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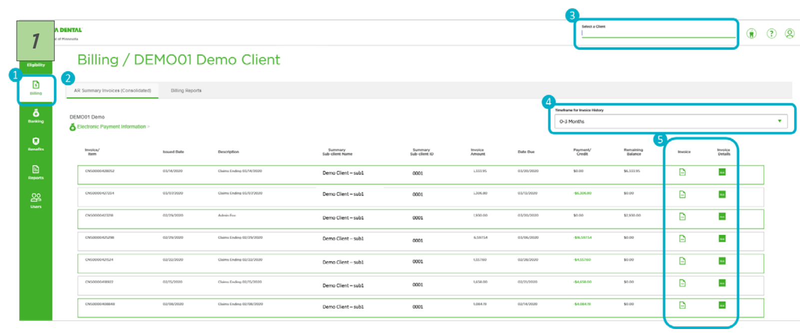

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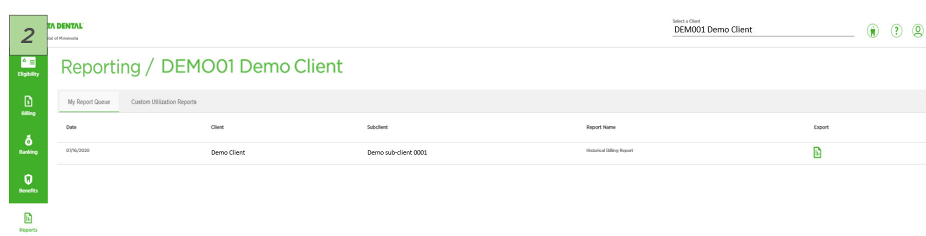
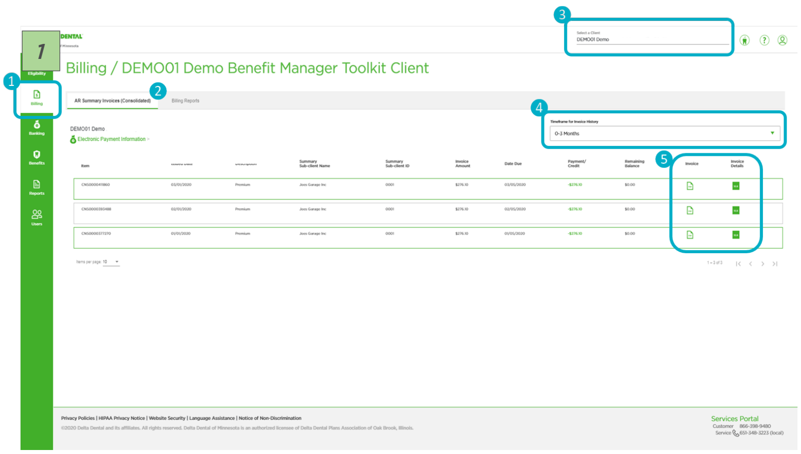


Employer Services Portal Quick Guide

How to view fully-insured billing reports

View your most recent AR Summary (aka consolidated) invoices and supporting billing reports (subscriber listings).



1. Select billing from the left navigation menu on the ESP home page.
2. The AR Summary screen displays:
   a. Your assigned client.
   b. Most recent billing transactions at the top of the page. ***(Image 1)***
3. If you have access to more than one client/group, select a client at the top line of the application to reveal AR data for an alternative client.
4. Select alternative time periods to view historical billing events.
5. Each billing event provides a corresponding invoice (PDF icon) and invoice details (XLS icon).
   a. Select either report icon at the line item level to view the supporting invoice and reports.
   b. Documents will download to your browser upon selection.

   NOTE: Some reports will take longer to generate. If so, you will be prompted to access the report in the Report Queue.
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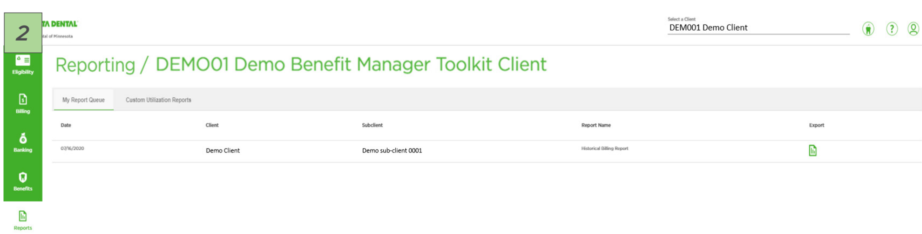
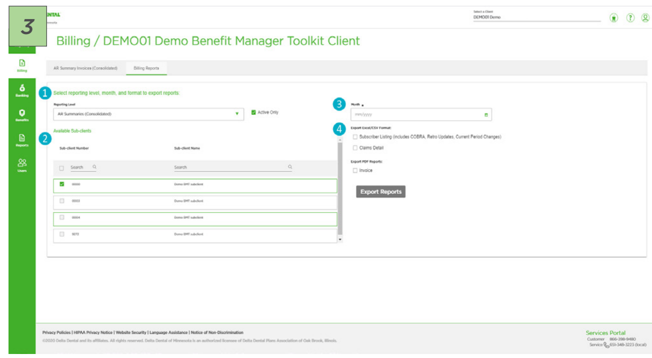


Employer Service Portal Quick Guide

View Your Historical Billing Reports (Dec 2019 and Current)

You can access AR Summary level (consolidated) as well as sub-client specific (non-consolidated) billing reports on the billing reports tab.



1. Select the reporting level you are interested in running. *(Image 3)*
   a. AR Summary reports combine defined sub-clients into one report.
   b. Sub-client level reports generate a separate report for each sub-client requested.

2. Select which sub-client(s) you are interested in running reports for.
   a. You may select one or many.
   b. The list is defaulted to show only active sub-clients.
   c. If you are looking for reports for an inactive sub-client, deselect the active only check box and search for the sub-client you are interested in.

3. Select the month and year for the report set you are interested in.
   NOTE: The system is restricted to running one month at a time.

4. Select the type of report and format.
   a. Available types and formats are displayed based on the report level and your security access.

5. Select export reports.
   a. Documents will download to your browser upon selection.
   NOTE: Some reports will take longer to generate. You will be prompted to access the report(s) in the report queue in those situations.

Employer Services Portal Quick Guide

How to claim your account

For clients that are new to the portal, we have provided you access to the Delta Dental of Minnesota Employer Services Portal (ESP) as your company's Super User. To ensure secure access, you will first claim the account. Once claimed you will have full access to your company client and sub-client data, along with the ability to create additional users within your company.

1. Upon creation of a new Super User, you will receive an email from Delta Dental of Minnesota Portal Services.
2. Follow the link on the email to claim your account.
3. Enter your 6-digit client ID.
    - The client ID is your 6-digit group number.
    - ID can be found on mail and email communications from Delta Dental of Minnesota. It may also be referred to in contract or summary plan description documents that you received from Delta Dental of Minnesota.
    - If you do not know your Client ID, please contact us at clientsuperuser@deltadentalmn.org

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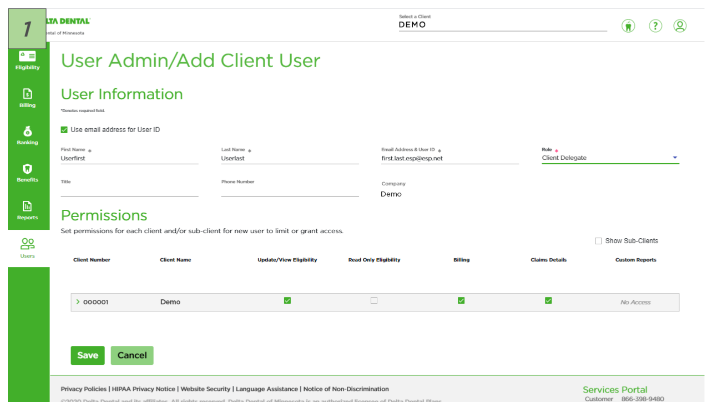
How to add a portal user

As the Super User, you have the ability to invite others within your company to be users of ESP. You may create Client Delegates or Client Users.

Client Delegates mirror the permissions of the Super User and also have the ability to maintain users in the portal. You are unable to change the permissions of a delegate, since they are kept consistent with the overall access of the Super User. If you wish to limit the access of a delegate, you would first change their role to Client User and update their permissions afterward.

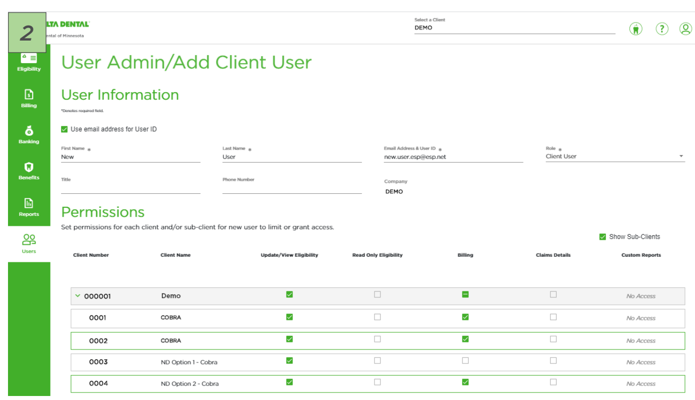
Client Users have access only as it is assigned to them when they are set up. A Client User may be granted access to all or some of the portal functions and may be granted access to all or some of the client/sub-clients available to the Super User.

To create a new client delegate:



1. Select users on the left navigation bar.
2. Select add user.
3. Enter required user information, including selection of the user ID. The user ID may be the same as the user's email.
4. Select the role of Client Delegate**.**
5. The Client Delegates permissions will automatically be updated to reflect that of the Super User.
6. Click save.
7. Click on user admin in the page header to return to the manage client users tab. ***(Image 1)***

To create a new user:



1. Select users on the left navigation bar.
2. Select add user.
3. Enter required user information, including selection of the user ID. The user ID may be the same as the user's email.
4. Select the role of Client User.
5. The company field will be pre-populated with your company.
6. In the permissions grid, select the functions you wish to grant to the new user.
7. To apply different permissions at the sub-client level, select the check box show sub-clients and select the appropriate functions for select sub-clients.
8. Click save.
9. Click on user admin in the page header to return to the manage client users tab. ***(Image 2)***

Employer Services Portal Quick Guide

How to update a portal user

As the Super User or Client Delegate, you have the ability to update a user's personal information or change their portal access.

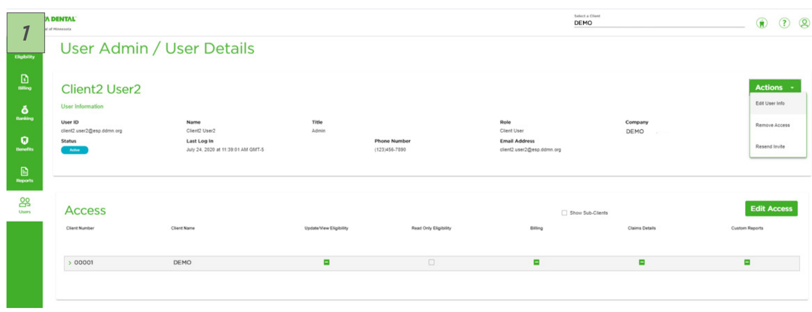
NOTE: Client Delegates mirror the permissions of the Super User.

To change a delegate's access, you must first change their role to Client User. The permissions and access of Super Users and Delegates can only be completed by your Delta Dental of Minnesota account representative. To designate someone new as the Super User for your group, please contact your Delta Dental of Minnesota account representative.

Client Users have access only as it is assigned to them when they are set up. A Client User may be granted access to all or some of the portal functions and to all or some of the client/sub-clients available to the Super User.

To Update a User's Information:

1. Select users on the left navigation bar.
2. Search for and/or select the user by clicking on the user's last name on the manage client users tab.
3. The user details page opens. ***(Image 1)***
4. Selecting actions in the user Information area will allow you to:
   a. Edit user info – change the user's personal information or change their user role.
   b. Remove access – will set the users status to Inactive and will disable their account.
   c. Resend invite link – If the user needs to claim their account, you can send an updated invitation



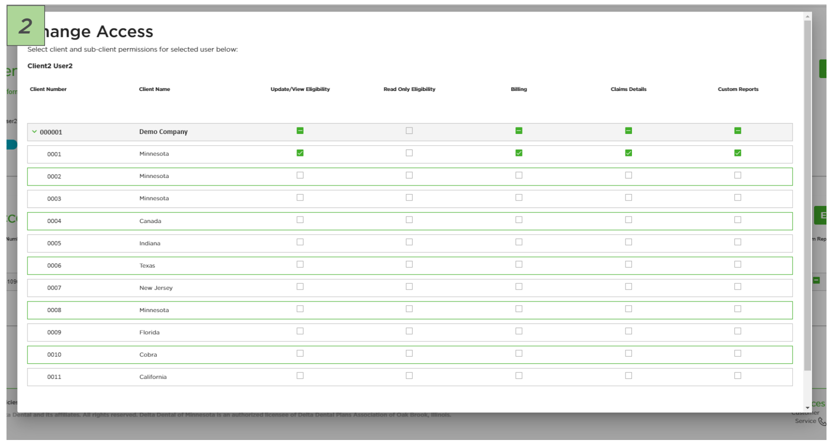
5. Selecting edit access will enable you to change the user's permissions or allow more of less portal functionality and/or add or remove access to specific sub-clients.
   a. The view is collapsed to the Client level by default.
   b. Users that have a check mark at the client level have access to all sub-clients associated with the client.
   c. For users that have dashes at the client level, their access varies by sub-client.
   d. Select the show sub-clients check box to see associate sub-clients by client.

Employer Services Portal Quick Guide

How to update a portal user

To change a user's permission:

1. To change a user's permission, select edit access.
2. The change access screen appears. *(Image 2)*
3. Select the expand arrow near the client ID to expand the permissions grid to show all sub-clients.
4. In the permissions grid, select or deselect the functions you wish to change for the user.
5. Click save once complete.
6. Select cancel to return to the user details page without updates.



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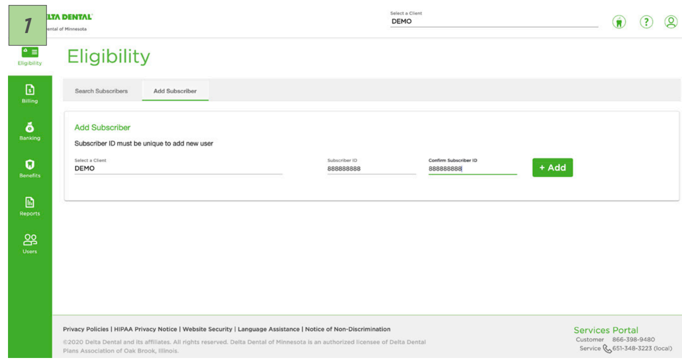
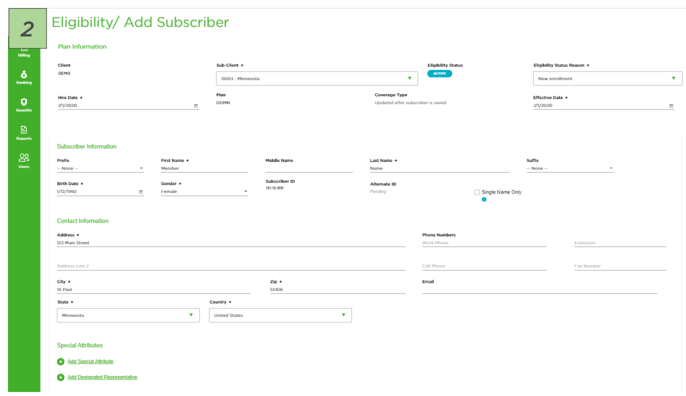
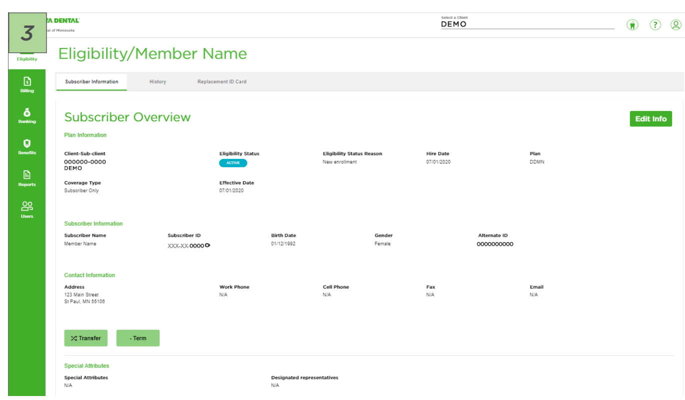
Employer Services Portal Quick Guide

How to add a subscriber (aka member)

1. Click on eligibility on the left navigation menu.
2. Click on add subscriber tab. *(Image 1)*
3. Confirm or select the client/group (your current client will be defaulted).
4. Enter the subscriber's social security number for subscriber ID (both fields must match) and select add.
5. On add subscriber page, confirm plan information.
    a. Select sub-client.
    b. Confirm eligibility status reason.
    c. Enter hire date and effective date.
6. Enter member / subscriber information and contact info. *(Image 2)*
7. Fields with an asterisk (*) represent required fields. These must be completed to enable the save button.
8. Special attributes and designated representative information may be added at the time of subscriber enrollment.
9. Select save.
10. The new subscriber's overview page will display.
11. Dependents may now be added. *(Image 3)*



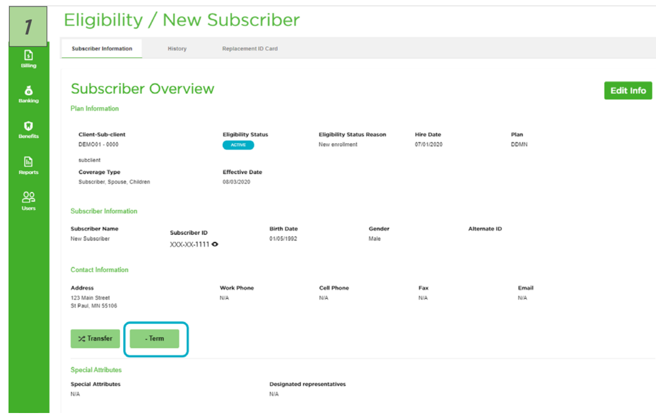


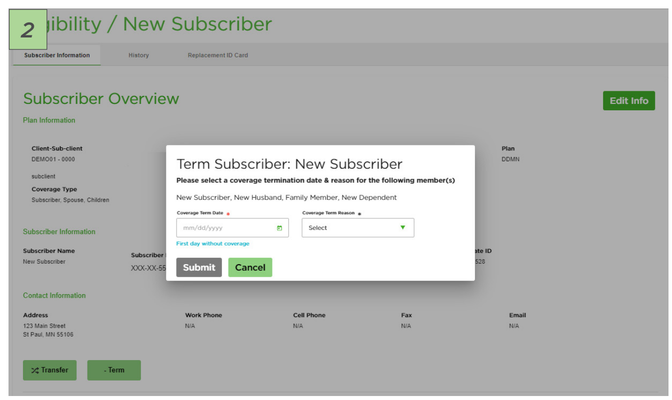


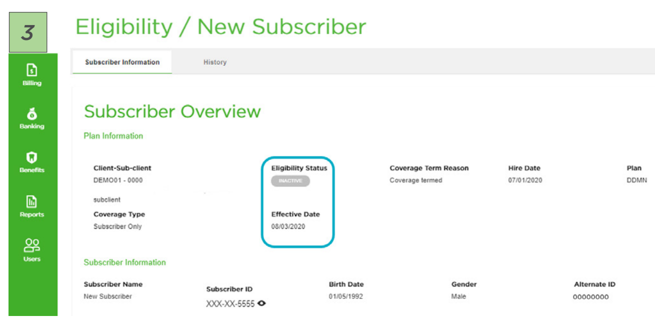
Employer Services Portal Quick Guide

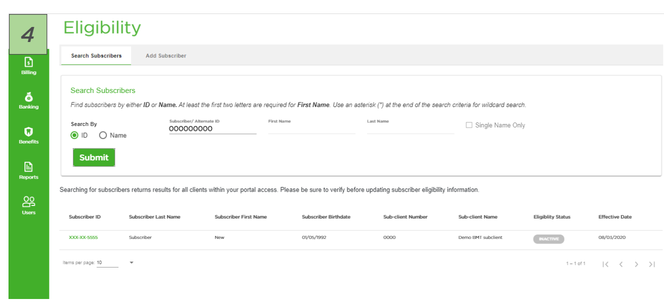
How to terminate a subscriber (member)

1. Click on eligibility on the left navigation menu.
2. Search for the intended subscriber on the subscriber search tab by name or ID.
3. Select the active subscriber from the results table.
4. The subscriber overview page will open.
5. Select the term button just below the subscriber's contact information. ***(Image 1)***
6. The termination window will open. Enter required information and click submit. ***(Image 2)***
7. Requesting a termination date in the past will be enabled according to your group's contract – the calendar will only allow date selection within those contract rules.
8. Entering a future dated termination will prompt an acknowledgment. The termination request can be viewed on the subscriber's history tab.
9. Any active dependents associated with the subscriber are listed in the window and will also be terminated with the same effective date.
10. Click cancel to return to the subscriber overview without termination.
11. The subscriber will be displayed as inactive status on subscriber overview. ***(Image 3)***
12. The subscriber will also be reflected as inactive in search results. ***(Image 4)***









Employer Service Portal Quick Guide

How to reinstate a subscriber (member)

1. Click on eligibility on the left navigation menu.
2. Search for the intended subscriber on the subscriber search tab by name or ID.
3. Select the inactive subscriber from the results table.
4. The subscriber overview page will open.
5. Select the + reinstate button just below the subscriber's contact information.
6. The reinstate window will open.
7. Select the effective date.
8. If the subscriber has had dependents on record, the names will display.
   a. Select the family members that are to be reinstated with the same effective date.
   b. The subscriber will already be selected.
9. Select submit.
10. The subscriber and selected dependents will now display in active status.
11. Entering a future dated reinstatement will prompt an acknowledgment. The reinstatement request can be viewed on the subscribers history tab.
12. Click cancel to return to the subscriber overview without reinstating.
13. Upon submit, the subscriber will be displayed in active status on subscriber overview.
14. The subscriber will also be reflected as active in search results with the effective date reflected.

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Employer Services Portal Quick Guide

How to reinstate a dependent

1. Click on eligibility on the left navigation menu.
2. Search for the subscriber on the subscriber search tab by name or ID.
3. Select the active subscriber from the results table.
4. The subscriber overview page will open.
5. Select the intended inactive dependent from the subscriber's list of dependents at the bottom of the screen. Click on the dependent's last name. *(Image 1)*

1

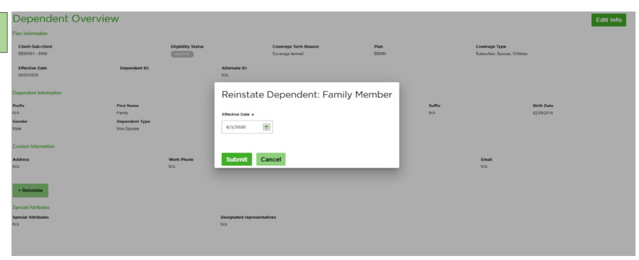
Dependents

Dependent Type	Last Name	First Name	Middle Name	Birthdate	Eligibility Status	Effective Date
Spouse	Husband	New		05/11/1992	ACTIVE	08/03/2020
Non-Spouse	Member	Family		02/09/2016	INACTIVE	08/03/2020
Non-Spouse	Dependent	New		02/14/2017	ACTIVE	08/03/2020

Add Dependent

6. The dependent overview page will open.
7. Select the +Reinstate button just below the dependent's contact information.
8. The Reinstate window will open. *(Image 2)*
9. Select the effective date.
10. Select submit.
11. Click cancel to return to the subscriber overview without reinstating.
12. The dependent will be displayed in active status on dependent overview page.

2



13. Select return to subscriber overview to see the dependent's active status and on the subscriber dependent list. *(Image 3)*

3

Dependents

Dependent Type	Last Name	First Name	Middle Name	Birthdate	Eligibility Status	Effective Date
Spouse	Husband	New		05/11/1992	ACTIVE	08/03/2020
Non-Spouse	Member	Family		02/09/2016	ACTIVE	08/03/2020
Non-Spouse	Dependent	New		02/14/2017	ACTIVE	08/03/2020

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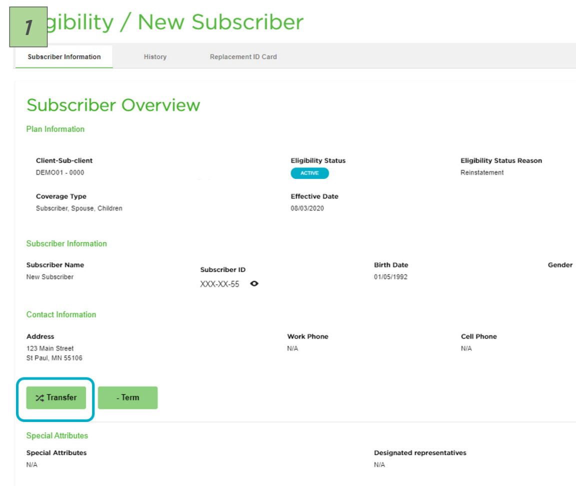
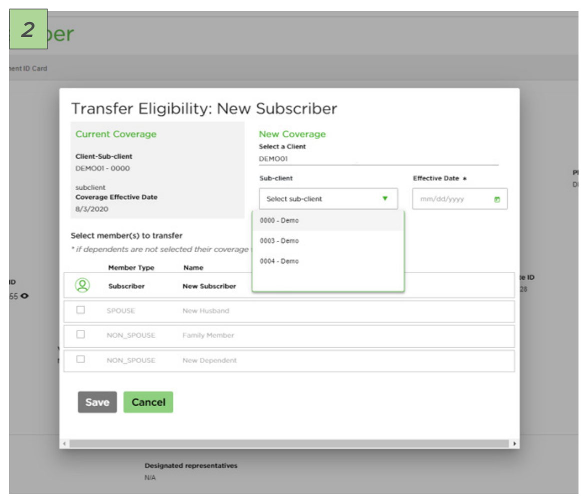
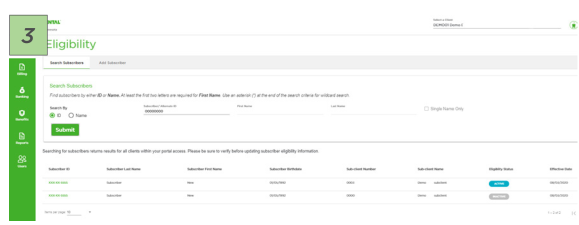
Employer Services Portal Quick Guide

How to transfer a subscriber (member) and family

1. Click on eligibility on the left navigation menu.
2. Search for the subscriber on the subscriber search tab by name or ID.
3. Select the active subscriber from the results table.
4. The subscriber overview page will open.
5. Select the transfer button just below the subscriber's contact information. *(Image 1)*
6. The transfer window will open. *(Image 2)*
7. Confirm or select new client to transfer to.
8. Select sub-client from drop down menu.
9. Select effective date.
10. If the subscriber has had dependents on record, the names will display.
    a. Select the family members that are to be transferred with the same effective date.
    b. The subscriber will already be selected.
    c. Any dependents not selected for transfer will be set to an Inactive status.
11. Select submit.
12. Click cancel to return to the subscriber overview without transferring.
13. Upon submit, you will be returned to the eligibility search screen.
14. Search for the intended subscriber on the subscriber search tab by name or ID.
15. The subscriber and selected dependents will now display in inactive status in the old client/sub-client and active status in the new client/sub-client. *(Image 3)*



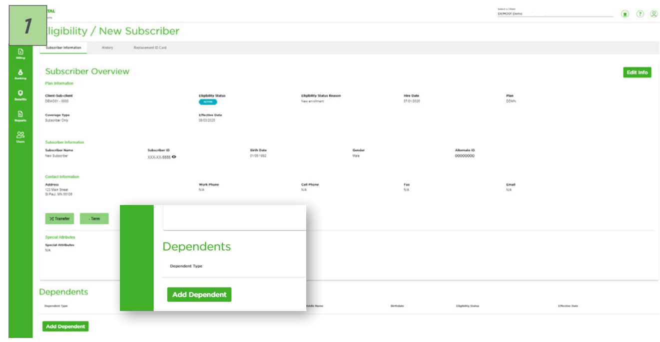


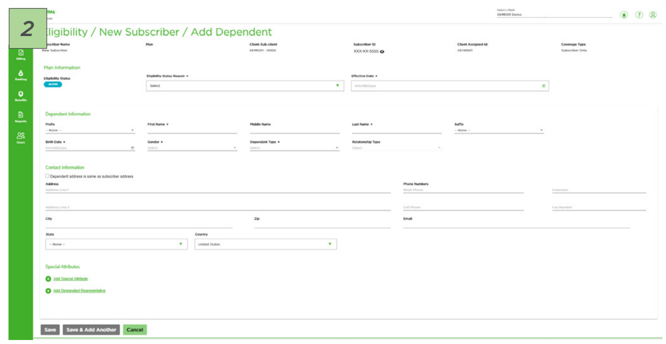


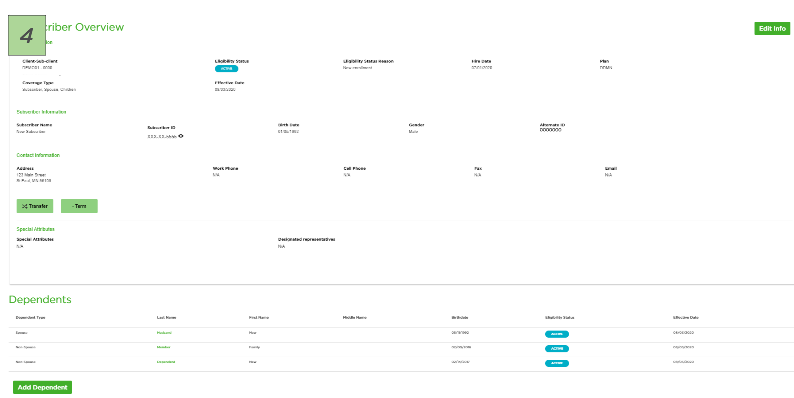
Employer Services Portal Quick Guide

How to add a dependent

1. Click on eligibility on the left navigation menu.
2. Search for the subscriber on the subscriber search tab by name or ID.
3. Select the subscriber from the results table.
4. The subscriber overview page will open.
5. At the bottom of the page, select add dependent. *(Image 1)*
6. The add dependent page opens. *(Image 2)*
7. Enter the require information:
   a. Address is not required for a dependent.
   b. Fields with an asterisk (*) These must be completed in order to the save button to be enabled.
8. Special attributes and designated representative information may be added at the time of subscriber enrollment.
9. Once information is entered, select save or save and add another to continue with additional family members.
10. Select return to subscriber overview to confirm list of dependents. *(Image 3), (Image 4)*







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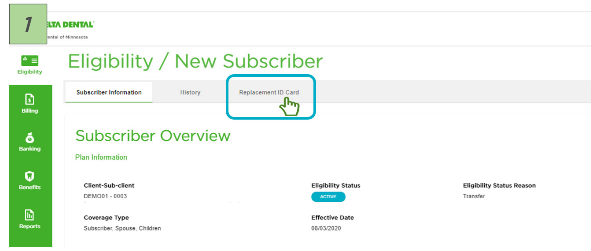
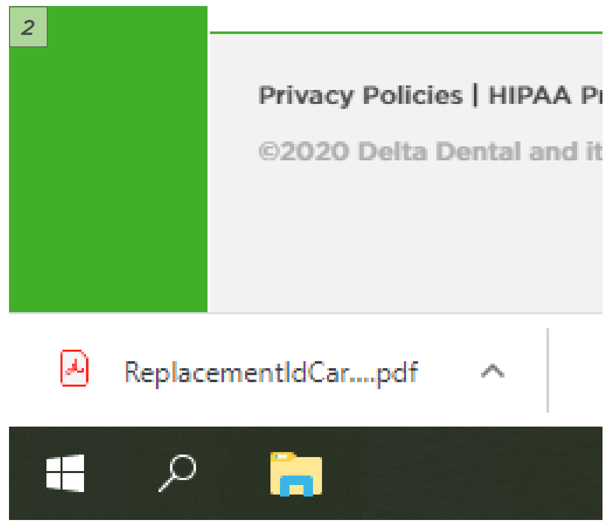
How to print a Subscriber's ID Card

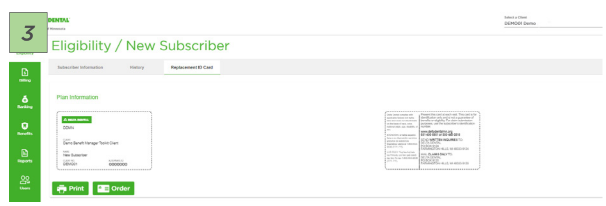
1. Click on eligibility on the left navigation menu.
2. Search for the intended subscriber on the subscriber search tab by name or ID.
3. Select the active subscriber from the results table.
4. The subscriber overview page will open.
5. Select the replacement ID card tab. *(Image 1)*
6. A screen view of the ID card – front and back – will display.
7. Select print.
8. A PDF formatted document will appear in your downloads folder. *(Image 2)*
9. Open the document to save or print.

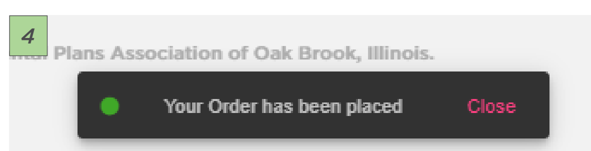




How to order a replacement subscriber ID card:

1. From the replacement ID card tab. *(Image 3)*
2. Select order.
3. A message will display that your order has been placed.
4. The order will be processed in 5-7 business days and will be mailed according to your groups instructions – either to the subscriber or to the group administrator. *(Image 4)*
5. Select eligibility to return to the subscriber search page.





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Employer Services Portal Quick Guide

Supported web browsers

The Employer Services Portal supports the latest web browsers. If you are having problems launching the portal, please make sure the web browser you are using is up to date with he latest versions and included in the list below.

Supported web browsers:

Chrome

Firefox

Safari

Edge

Internet Explore
(Version 11 or later)